What's New List for Version 16.2
of Tabs3, PracticeMaster, and Tabs3 Financial Software

Tabs3 Connect

### Tabs3 Connect - New Mobile Solution for Tabs3 & PracticeMaster Platinum Software

- **Tabs3 Connect** provides access to Tabs3 and PracticeMaster anywhere you can connect to the Internet. No apps to download, simply go to www.Tabs3Connect.com and log in using your iPhone®, Android device, iPad®, laptop, or even an Apple® computer. Tabs3 Connect gives you access to your client and contact information, fee and cost entry, personal and firm-wide calendar, and more. On smartphones and tablets, you can tap to create a fee, and flick to scroll through a list. Tabs3 Connect was designed to protect attorneys' sensitive information. The information you access using Tabs3 Connect is secure because it resides at your office, on your computer. It won't be stored on someone else's server in the cloud, or on a phone that you might lose.
  - Enter fees and costs for clients when they happen
  - Case information at your fingertips using Matter Manager
  - More than the calendar on your smartphone
    - See all appointments for a matter, not just yours
    - Add an appointment and assign it to a matter, and include others from your office
    - Other people in your office see your entries immediately
    - You see what other people in your office see
  - Access business contacts without synching with Outlook
  - Data is stored safely at your office
  - Communicate instantly with others in your office using eNote instant messages
  - Download documents and e-mail attachments
- Tabs3 Connect requires one additional server connection.
- Firms with licenses of both Tabs3 and PracticeMaster Platinum enrolled in maintenance contracts receive Tabs3 Connect at no additional charge. For more information, e-mail tabs3connect@tabs3.com or contact your local consultant or reseller.

Tabs3, PracticeMaster, and Trust Accounting Software

Timekeeper File

- Added the ability to mark a timekeeper as inactive.
  - Added a **Show Inactive** check box to the Timekeeper lookup window making it easy to show or hide inactive timekeepers. Inactive timekeeper numbers are enclosed in parentheses in the lookup window.
  - In PracticeMaster, added a built-in **Active Only** filter to the Quick Clicks pane.
  - Added the ability to include **Active Only** timekeepers on the Timekeeper List.
  - Inactive timekeepers are shown on the Timekeeper List with an asterisk "*" next to the name.
  - Fee and cost transactions cannot be added for inactive timekeepers; however, transactions can be edited or deleted for inactive timekeepers.
- Changed the label for the Timekeeper List in Tabs3 from **Name** to **Initials** to indicate the alpha sorting is by Initials.
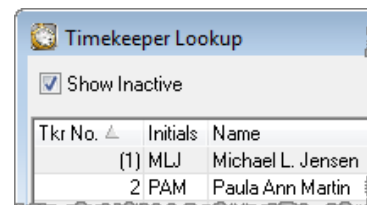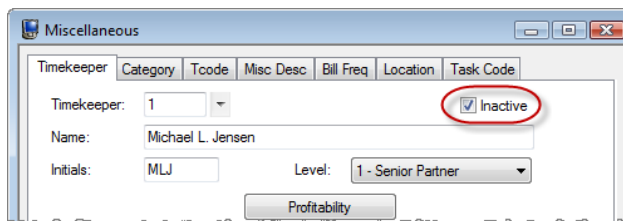
Rename Contact
- Added an option to open the contact record after renaming allowing you to easily update additional fields.
- You are no longer prompted to make a backup before running the Rename Contact program.
- **Rename Contact** can now be used while other people are in the software *(changed in v16.1.2.1013)*.
- In PracticeMaster:
  - Added the **Rename Contact** menu option to the **Take Action** menu in Quick Clicks for the Contact file.
  - Added the **Rename Contact** menu option to the **Action** right-click menu in the **List** tab of the Contact file.

PracticeMaster Changes

Quick Clicks Enhancements
- A new Manage Quick Clicks window consolidates access to Quick Clicks items.
- Added the ability for each user to:
  - Create folders and organize items as desired. Drag and re-order items in the desired folders.
  - Perform common tasks such as add, copy, edit, rename, or delete items.
  - Hide unused items.
- Use any of the following Quick Clicks items to open the Manage Quick Clicks window:
  - Manage Column Layouts
  - Manage Filters
 - Manage WorkFlows
  - Manage Quick Clicks
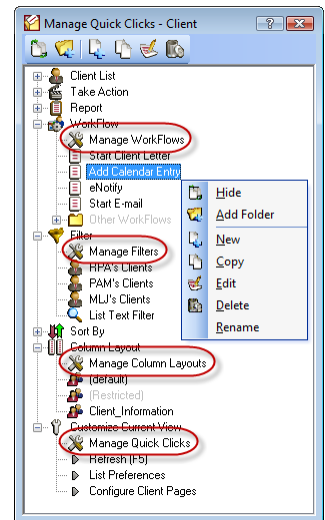
New Active Only Options
- Added **Active Only** options in the Quick Clicks pane making it easy to show or hide inactive records in conjunction with performing additional filtering and sorting. The **Active Only** options are available for the Client, Contact, and Timekeeper files in new **Client List**, **Contact List** and **Timekeeper List** sections.
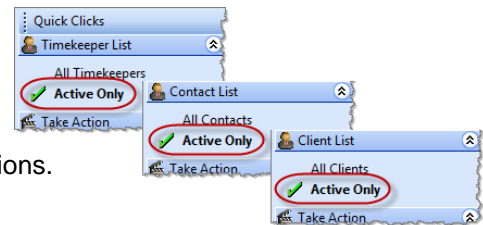
Improved Column Layouts
- Added a **Show for all users** check box, thus providing the ability to define global or private column layouts.
  - Added a new access right to the Access Profile called **Manage Filters/Column Layouts for All users**, thus making it easy to prevent users from modifying global column layouts.
- Added the ability to hide column layouts that you do not use.
- Added the ability to use spaces in column layout names and up to 50 characters (previously only 40 characters could be used).
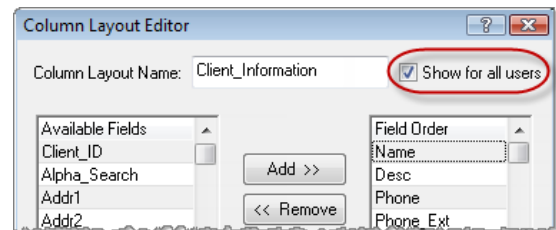
Improved Filters
- Added a **Show for all users** check box making it easy to define a filter for everybody.
  - Added a new access right to the Access Profile called **Manage Filters/Column Layouts for All users**, thus making it easy to prevent users from modifying global filters.
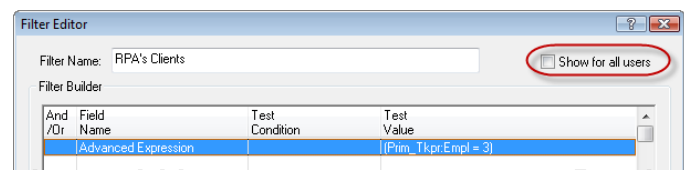
- Improved the filtering to automatically use an index whenever possible, thereby providing significantly faster results. An asterisk is shown in the **Filtered*** status to indicate faster indexing is being used.
- Added the ability to rename filters.
- Added a **Filtered** status indicator to the Visual Timer Display and Calendar.

Improved Filter Editor

- Simplified the creation of filters with the new Filter Editor.
- Replaced the Query Wizard with the new Filter Editor.
- Renamed the **Query** tab in Report Writer to **Filter**. This tab uses the new Filter Editor.
- Added several new date and time functions making it easier to create expressions and filters.
- Improved date filtering by adding new Test Conditions including *in the next*, *in the last*, *older than*, and *beyond*. These conditions simplify the creation of expressions as well as eliminate the need for editing date expressions each new period.
- Changed the Test Value comparison to no longer be case sensitive.
- Increased the maximum size of the filter name to 50 characters (previously only 40 characters could be used).
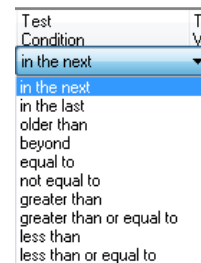
WorkFlows Enhancement

- You can now use expressions in the following WorkFlow Action fields when starting e-mail and eNote messages, or displaying messages. This new feature provides powerful flexibility allowing you to include field values, variables, and logic in these fields.
    - **Start E-mail:** To, Cc, Bcc, Subject, Body.
    - **Start or Send eNote:** To, Body.
    - **Display Message:** Title, Body.

Improved Calendar Access Rights

- Simplified how calendar rights are assigned for users in System Configuration by adding a view of what calendar rights have been granted to the current user.
    - Easily see whose calendars you have rights to.
    - Modify your rights to other users' calendars from your user record (requires Manager rights).
- Added the option to give all other users rights to edit your public calendar by default, including new users via the new **Allow all users to edit public calendar** check box. You no longer have to edit all users' rights when a new user is added.
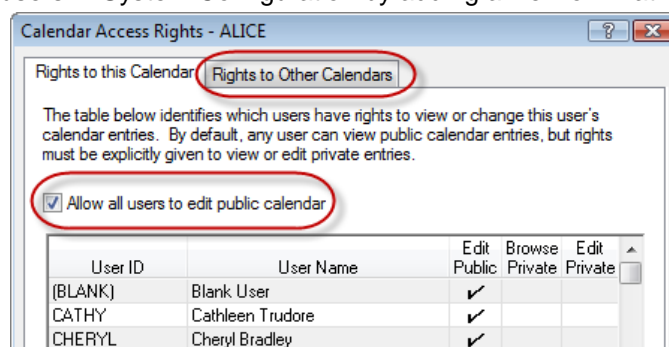
Calendar Enhancement

- Added the ability to reposition or remove the User Initials from the graphical calendar.
- Optimized the speed of the calendar display when the Task List is shown. Changed the Calendar Properties window to indicate which Task List options are faster and which may be slower.

Auto E-mail Notification

- E-mail notifications for PracticeMaster Calendar records have been enhanced to:
    - include the Description field in the subject line; and
    - include the Client ID, Client Name, Client Work Description, Contact, and Location fields in the message itself in addition to the Date, Time, and Description.

New WordPerfect Toolbar Plug-in

- Added a new toolbar plug-in for WordPerfect that allows you to work with documents in WordPerfect and save them as Document Management records in PracticeMaster.

- o Use the **PM Open** button in WordPerfect to open or switch to PracticeMaster's Document Management list, allowing you to open a linked document for viewing or editing.
- o Use the **PM Save** button in WordPerfect to save a document as a new document management record, or edit the corresponding record, or update the conflict of interest and document search indexes in PracticeMaster.
- Create Journal, Calendar, and Fee records while working with a WordPerfect document. Fee records are then automatically synchronized to Tabs3 for billing purposes.
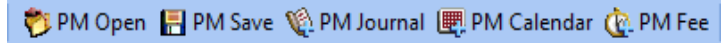
Conflict of Interest Search Results
- Conflict of Interest results are now sorted by modified date rather than by file, allowing you to see the most recent results first.
- More accurate results are provided when searching for exact phrases that contain words on the exclude list.

Conflict of Interest Search Faster (Platinum Only)
- Optimized conflict searches to use the Platinum report accelerator, thus eliminating network traffic and *dramatically* improving searches that use the "Contains" option.

eNotify Record Changes (Platinum Only)
- Using the eNotify feature from various files has been enhanced to include additional info as follows:
  - o **Calendar**: Includes the Client ID, Client Name, Client Work Description, Contact, and Location fields in the message itself in addition to the Date, Time, and Description.
  - o **Document Management**: Includes the associated Client Name, Client Work Description, Contact, and a link to the assembled document in the message itself in addition to the Client ID and document Description fields.
  - o **Fee, Costs, Journal, Common Client Related Files**: Includes the Client Name and Client Work Description in addition to the Client ID.
 - o **Journal**: Includes the Contact name if used.

Tabs3 Changes

Recap of Hours Report
- Added the ability to exclude inactive timekeepers.

Reprint Statements
- Added the ability to specify a range of statement dates, thereby providing the ability to easily reprint all statements during a specified time frame for one or more clients. Previously, you could only specify a single statement date.
- Added the ability to generate PDFs as individual statements when reprinting multiple statements. Previously, reprinted statements for multiple clients were included in a single PDF file when printing to DropBox or using the Print to PDF File option.
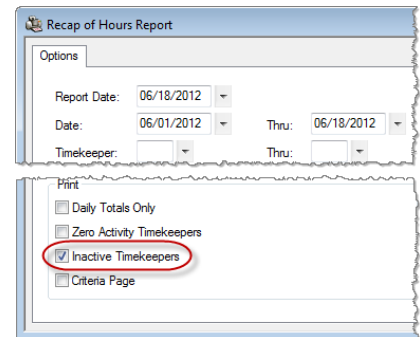
New Accounts Receivable by Timekeeper Report (Platinum Only)
- Added a new Accounts Receivable by Timekeeper Report that includes all clients with fees due by working timekeeper.
- Easily see receivables for only those clients that a timekeeper worked on regardless of the primary, secondary or originating timekeeper.
- Helps identify attorneys who may need collections assistance.
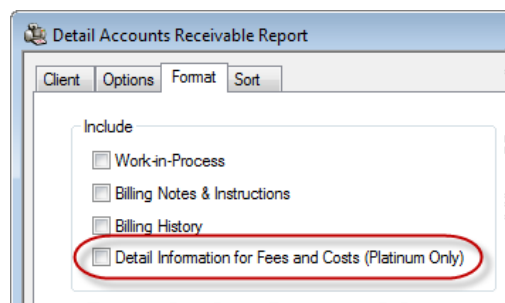- Easily determine how much each working timekeeper is currently owed.

- Optionally include matter work description, aging breakdown, work-in-process fees, total fees due for all timekeepers, percentage of total fees due, and total balance due.
- Includes the ability to select clients based on a specified minimum balance that applies to a designated aging period and older for the working timekeeper, making it easy to identify clients that have aged receivables greater than a specified amount.
- Includes the ability to only select clients that have no payments within a specified number of days, making it easy to identify clients who are not actively making payments on their account.
- Includes the ability to specify a working timekeeper range.

Detail Accounts Receivable Report Enhancement (Platinum Only)
- Added an option to include detail information for fees and costs, allowing you to view aged receivables for each working timekeeper and cost type.
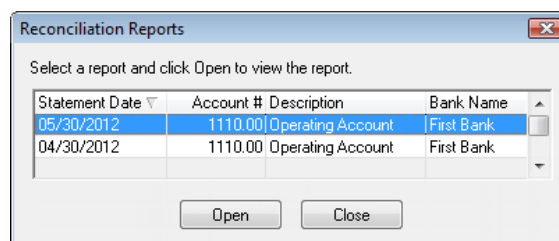
	0-30	31-60	61-90	91-120	121+	Total
Fees	1,750.00	0.00	0.00	0.00	0.00	1,750.00
1-MLJ	250.00	0.00	0.00	0.00	0.00	250.00
5-KIM	1,500.00	0.00	0.00	0.00	0.00	1,500.00
Expenses	0.00	0.00	0.00	0.00	0.00	0.00
Advances	0.00	0.00	95.00	0.00	0.00	95.00
Filing Fees	0.00	0.00	10.00	0.00	0.00	10.00
Processor Fees	0.00	0.00	85.00	0.00	0.00	85.00
Fin Charge	0.00	0.00	0.00	0.00	0.00	0.00
Total	1,750.00	0.00	95.00	0.00	0.00	1,845.00

Detail Accounts Receivable Report

Client | Options | **Format** | Sort

Include
- [ ] Work-in-Process
- [ ] Billing Notes & Instructions
- [ ] Billing History
- [ ] Detail Information for Fees and Costs (Platinum Only)

Trust Accounting Software (TAS) & General Ledger Software (GLS)

Reconciliation Report
- Added the ability to reprint a Reconciliation Report after the bank account reconciliation has been finalized.
  - Added a new **Reconciliation Reports** window that allows you to select the desired report.
  - Added a new **Reconciliation Reports** icon to the Journal Entries Task Folder.
  - Added a new **Reconciliation Reports** menu option to the Reports menu.
 - Reconciliation reports are stored as PDF files under a new Reconciliation folder.

Reconciliation Reports

Select a report and click Open to view the report.

Statement Date ▽	Account #	Description	Bank Name
05/30/2012	1110.00	Operating Account	First Bank
04/30/2012	1110.00	Operating Account	First Bank

Open | Close

All Software

Change and Remember Font Size of Memo Fields
- You can change the font size of a memo field using the keyboard and the scroll function of your mouse. The software will now save the setting for each user. This affects all memo fields including the fee description, cost description, client notes, journal description, etc. The following methods can be used to instantly control how large or small the text displays.
  - To enlarge the display
    - Press the Ctrl key while scrolling up
    - Press Ctrl + "="
    - Press Ctrl + "+" (on the number keypad)
  - To reduce the display
    - Press the Ctrl key while scrolling down
    - Press Ctrl + "–"
  - To reset the zoom to 100%
    - Press Ctrl + "0"

Date Picker

- When picking a date, 6 weeks are always shown in each month instead of just 4 or 5 weeks.
- Added a **Today** button on the Calendar date picker window making it easy to return to the current date.
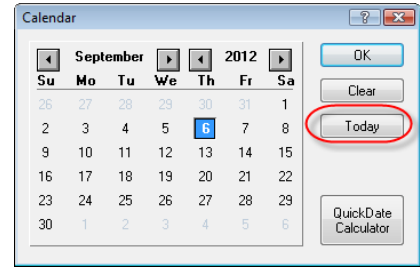
Support Log

- Improved the Data File Integrity Check section of the Support Log to indicate whether errors were encountered, the number of errors and the version of the software.
- Added tracking for the Rename Contact program.
- Added tracking for the Renumber Client program in PracticeMaster and Trust Accounting Software.

Miscellaneous Changes

Fast Access Mode Sunset

- Removed Fast Access Mode functionality from the software.

Platinum Software Requirements

- Starting with Version 16.2, Platinum Server software will no longer run under Windows XP Professional. The Platinum Server requires Microsoft Windows Server 2008/2003 (either 64-bit or 32-bit version), Windows Server 2008 R2, Windows Small Business Server 2011/2008/2003 (either 64-bit or 32-bit version), or Windows 7. A 64-bit operating system is required for Platinum SQL Server.
- Workstations can still run under Windows XP (as well as Windows 7 or Windows Vista).